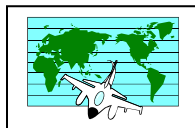
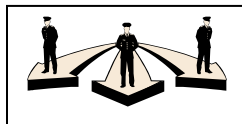


# **OPTARSS TASK ORDER GUIDELINES**



Army Contracting Agency  
Southern Region Contracting Center-East  
Mission Division  
Fort McPherson, GA  
August 2006

## OPTARSS TASK ORDER GUIDE

### A. GENERAL.

**A1. SCOPE:** Operations, Planning, Training, and Resource Support Services (OPTARSS) is a multiple award, indefinite delivery-indefinite quantity (IDIQ), task order (TO) driven, operations contract awarded for five years (base and four, one-year option periods). The OPTARSS contract will provide support services for Army operations customers in the following task areas:

- Task 1: Operational Planning
- Task 2: Training
- Task 3: Modeling and Simulation
- Task 4: Flight Operations
- Task 5: Mobilization Plans and Execution
- Task 6: Deployment Operations
- Task 7: C4I Systems Management
- Task 8: Program Management Process
- Task 9: Force Protection Program
- Task 10: Transformation
- Task 11: Organizational Support
- Task 12: Task Order Management

The contracts, with detailed descriptions of all task areas can be found on the OPTARSS web page: <http://www.forscom.army.mil/aacc/OPTARSS/default.htm>.

**A2. ORDERING PERIOD:** 11 March 2003 – 10 March 2004 (base) plus four one-year options ending 10 March 2008, which may be exercised at the discretion of the OPTARSS Contracting Officer. TOs may only be issued by properly appointed contracting officers and must be issued during the ordering period. TOs may include options, may extend beyond the term of the basic contract and options may be exercised after the term of the basic OPTARSS contract is complete. However, once the basic contract has expired, there will be no additional authority to add new work or to increase the scope of the orders. The ordering period may change depending on DFARS implementation of Section 843 of the Defense Authorization Act for Fiscal Year 2004.

**A3. PROGRAM CEILING:** The program ceiling is \$650 Million. This is defined as the total dollars of all TOs against all of the contracts through the life of the contracts and TOs. Once this total dollar value is reached, no new TOs or TO options will be issued or exercised. Contractors will submit quarterly reports to SRCC-E identifying all TOs received to date, to enable monitoring of the cumulative ceiling.

**A4. AUTHORITY TO PLACE TASK ORDERS:** The Army Contracting Agency Southern Region (ACASR), Southern Region Contracting Center East (SRCC-E), Mission Division, Fort McPherson, Georgia will award TOs for operations support services for its mission customers (FORSCOM, USARC, First Army, Third Army). The contract also allows any other Army

Contracting Agency (ACA) contracting office to issue task orders within the scope of the program in support of a DoD mission.

Other major subordinate Army commands and installations may request a written delegation of contract authority to place TOs in support of their customers, as may non-Army, DoD customers. These requests will be evaluated, among other things, in light of the program maximum dollar ceiling of \$650M. If granted said authority, these contracting activities are responsible to execute and administer their own requirements IAW regulation and this TO Guide. Requests from non-DOD organizations will be considered by SRCC-E on a case by case basis after consultation with counsel.

Requests for authority to issue TOs should be directed to Mrs. Dixie Lee Hall at halld@forscom.army.mil or **dixie.lee.hall @us.army.mil** and should contain the following information:

- MACOM or Defense Activity
- Contracting Office
- Mailing address
- Contracting Officer's Name(s), warrant level and DAWIA certification level
- Email address
- Telephone number (commercial and DSN); and
- A statement from the Contracting Officer of the intent to comply with the procedures in this guide.

**A5. SERVICE FEE:** There is no fee for the use of the contracts by any approved customer activity or agency. In the rare case when SRCC-E agrees to use the contract for other than core customers as defined in paragraph A4 above, SRCC-E may negotiate for reimbursement for its additional services.

**A6. FISCAL YEAR CUT-OFF DATE.** The SRCC-E cut-off date for submitting requirements that must be awarded by the end of the fiscal year is 1 July. Other using activities may establish their own cut off dates.

**A7. PRICING ARRANGEMENTS.** The OPTARSS contracts are indefinite delivery indefinite quantity (IDIQ) contracts permitting TOs that are Firm-Fixed Price (FFP), Cost Plus Fixed Fee (CPFF), Time and Materials (T&M) or Labor Hours (LH). The optimal and preferred task order award will be FFP. The potential use of CPFF, T&M, or Labor Hour task orders remains a matter within the discretion of the ACOs after compliance with the documentation requirements of FAR 16. Individual task orders will set forth contractor's associated loaded labor rate for applicable contract type.

**A8. NON-PERSONAL SERVICES:** Services under OPTARSS are to be non-personal services only as defined in FAR 37.101.

**A9. IDIQ OMBUDSMAN:** The IDIQ ombudsman required by FAR 16.505(b)(5) is the ACASR Competition Advocate, currently Ms. Laura Eichhorn, Army Contracting Agency Southern Region, 404-464-2040, DSN 367, email: [Laura.Eichhorn@us.army.mil](mailto:Laura.Eichhorn@us.army.mil).

## **B. PLACING ORDERS**

**B1. ACQUISITION PLANNING:** Before beginning the OPTARSS process, the customer must prepare a performance-based requirements package. TO Contracting Officers are encouraged to work with their customers early in the preparation of these documents and, as appropriate, to consider providing a draft PWS to the OPTARSS contractors for comment and questions. However, before a decision is made to use OPTARSS, the TO Contracting Officer must ensure the task is within the general scope of the OPTARSS contract (e.g. task areas, contract maximums, ordering limits). In addition, the TO Contracting Officer should conduct market research to ascertain whether or not the requirement should be set aside for small businesses as discussed in B4 below.

**B2. CONTRACT ADVISORY AND ASSISTANCE SERVICES (CAAS):** Many of the task areas in the OPTARSS contract include services that fall within the definition of CAAS in FAR 2.101 and DFARS 237.201. (Click here for details: <http://farsite.hill.af.mil/vffara.htm> or <http://farsite.hill.af.mil/VFDFARA.HTM>.) It is the responsibility of the requiring activity to provide the proper funds and the approvals identified in FAR 37.204. It is the responsibility of the ordering office to obtain copies of the Management Decision Documents evidencing said approvals and to maintain them in the files. AR 5-14 also pertains.

**B3. CONTRACT MINIMUM/MAXIMUM:** The government's guaranteed minimum obligation under these contracts is \$10,000 (base period only). This has been obligated by SRCC-E. The minimum TO amount is \$10,000. Neither the government nor the contractor are obligated to use the contract for TOs under this amount per FAR 52.216-19. The maximum TO amount is any order for a single item in excess of \$4,000,000 or for a combination of items in excess of \$20,000,000 or a series of orders from the same ordering office within 10 days that together call for quantities in excess of these amounts. The contractor may honor orders beyond these amounts, and is required to notify the ordering office within seven days if they do not intend to honor the order. The entire program maximum for all contracts is \$650M, which is being monitored by the OPTARSS Contracting Officer via contractor quarterly reports. When TOs placed begin to approach this maximum, the OPTARSS Contracting Officer may be required to notify TO Contracting Officers to discontinue placing new orders.

**B4. SMALL BUSINESS CONSIDERATIONS:** If the criteria in FAR 19.502-2(b) are present, then the DoD Rule of Two shall apply, and your requirement must be set aside for small businesses or their subcategories (e.g. HUB Zone, 8(a)) and you cannot place a TO under OPTARSS. The same is true for services that are presently set aside for socioeconomic programs under FAR Par 19 or related directives. Recent GAO decisions have confirmed that small business rules pertain to multiple award task order contracts such as OPTARSS.

In addition, there has recently been a great deal of attention to “bundled contracts” as defined in FAR 2.101. Special requirements pertaining to bundled contracts were implemented in FAC 2001-17 (October 20, 2003) implementing the Office of Management and Budget’s Oct 2002 report. All proposed TOs should be carefully screened for potential “bundling”. See FAR 7.104 for additional steps to take should your proposed TO include bundling, especially bundling in excess of \$7M, which is called substantial bundling. You are encouraged to consult with counsel should bundling be a possibility in your TO package.

**B5. TO LEADTIMES:** After extensive discussions with OPTARSS contractors, we recommend allowing two to three months to place a TO over \$100,000. In order to allow them to find the best possible personnel and to be prepared to perform in an efficient and effective manner, the OPTARSS contractors request at least ten working days to prepare their proposals. They also request at least ten working days after award to prepare to begin performance. Should the TO require the contractor to establish a facility or facilities, deploy or provide esoteric labor categories, the ten days may not be sufficient for either the proposal or for the preparation time. Having said this, the contractors also realize there will be urgent situations that will require more expeditious processes and are willing to comply.

**B6. COMPETITION:** TOs under OPTARSS must comply with all applicable statutes and regulations. Specifically, they must comply with Section 803 of the National Defense Authorization Act of 2002 as implemented by DFARS 216.505 and FAR 16.505. For convenience, the current text is provided herein, but you should verify the regulations prior to placing your order. The following links to the FAR and DFARS (respectively) are for your assistance: <http://farsite.hill.af.mil/vffara.htm> and <http://farsite.hill.af.mil/VFDFARA.HTM>.

***DFARS 216.505 Ordering.***

*Orders placed under indefinite-delivery contracts may be issued on DD Form 1155, Order for Supplies or Services.*

***216.505-70 Orders for services under multiple award contracts.***

*(a) This subsection--*

*(1) Implements Section 803 of the National Defense Authorization Act for Fiscal Year 2002 (Pub. L. 107-107);*

*(2) Applies to orders for services exceeding \$100,000 placed under multiple award contracts, instead of the procedures at FAR 16.505(b)(1) and (2) (see Subpart 208.4 for procedures applicable to orders placed against Federal Supply Schedules);*

*(3) Also applies to orders placed by non-DoD agencies on behalf of DoD; and*

*(4) Does not apply to orders for architect-engineer services, which shall be placed in accordance with the procedures in FAR Subpart 36.6.*

*(b) Each order for services exceeding \$100,000 shall be placed on a competitive basis in accordance with paragraph (c) of this subsection, unless the contracting officer waives this requirement on the basis of a written determination that--*

*(1) One of the circumstances described at FAR 16.505(b)(2)(i) through (iv) applies to the order; or*

*(2) A statute expressly authorizes or requires that the purchase be made from a specified source.*

*(c) An order for services exceeding \$100,000 is placed on a competitive basis only if the contracting officer--*

*(1) Provides a fair notice of the intent to make the purchase, including a description of the work the contractor shall perform and the basis upon which the contracting officer will make the selection, to all contractors offering the required services under the multiple award contract; and*

*(2) Affords all contractors responding to the notice a fair opportunity to submit an offer and have that offer fairly considered.*

*(d) When using the procedures in this subsection--*

*(1) The contracting officer should keep contractor submission requirements to a minimum;*

*(2) The contracting officer may use streamlined procedures, including oral presentations;*

*(3) The competition requirements in FAR Part 6 and the policies in FAR Subpart 15.3 do not apply to the ordering process, but the contracting officer shall consider price or cost under each order as one of the factors in the selection decision; and*

*(4) The contracting officer should consider past performance on earlier orders under the contract, including quality, timeliness, and cost control.*

The exceptions to the Fair Opportunity referenced in DFARS 216.505(70)(b)(1) above are provided here:

***FAR 16.505 (b)(2) Exceptions to the fair opportunity process. The contracting officer shall give every awardee a fair opportunity to be considered for a delivery-order or task-order exceeding \$2,500 unless one of the following statutory exceptions applies:***

*(i) The agency need for the supplies or services is so urgent that providing a fair opportunity would result in unacceptable delays;*

*(ii) Only one awardee is capable of providing the supplies or services required at the level of quality required because the supplies or services ordered are unique or highly specialized;*

*(iii) The order must be issued on a sole-source basis in the interest of economy and efficiency as a logical follow-on to an order already issued under the contract, provided that all awardees were given a fair opportunity to be considered for the original order.*

*(iv) It is necessary to place an order to satisfy a minimum guarantee.*

Any action above \$100,000 that will not provide the fair opportunity as defined above shall include written documentation regarding the specific exception involved. It is suggested these documents be reviewed by legal counsel prior to solicitation.

**B7. OPTARSS FAIR NOTICE:** Testing of a password protected web page used to post OPTARSS opportunities has been completed and resulted in the abandonment of the practice. Email is the preferred mechanism for the notification of OPTARSS opportunities as discussed in DFARS 216.505. SRCC-E has an OPTARSS email distribution list, which we will send to any authorized ordering officer upon their request.

**B8. EVALUATION FACTORS:** As with any solicitation, it is critical that the Task Order Request for Proposal (TORFP) detail the criteria that will be used to select the successful contractor, and that the actual evaluation comply with criteria identified. The procedures used to evaluate the offers and the information requested from contractors should be **streamlined**. The OPTARSS contracts state “the Government’s award decision will be based on selection criteria, which address past performance, technical/management approach, progress towards subcontracting goals, and price/cost. Individual TO selection criteria will include the factor(s) relevant to the particular TO and their importance.” (G.7.3)

The criteria used to select a contractor under OPTARSS will vary depending upon the type of service being solicited.

1. Cost or price must always be a factor per DFARS 216.505(70)(d)(3). Clauses H24 H27 discuss pricing. H27 also requires the contractors to include a detailed description of all Other Direct Costs (ODCs) in their proposals. ODCs are defined as material and travel. (See also paragraph B12 below for limits on Material.)

2. Past performance (including prior relevant experience) should be considered for every TO over \$100,000. It was envisioned under OPTARSS that the past performance ratings under the original contract award would be used to evaluate task orders while it was current. It is also the intention of this office to re-evaluate past performance on a period basis, thus eliminating the need to collect and evaluate past performance information for most TOs. Contact the OPTARSS Contracting Officer, Mrs. Dixie Lee Hall at 404-464-3844 or via email at [halld@forscom.army.mil](mailto:halld@forscom.army.mil) or [OPTARSS@FORSCOM.ARMY.MIL](mailto:OPTARSS@FORSCOM.ARMY.MIL). She will provide you the current past performance ratings for the OPTARSS contractors. You are discouraged from soliciting past performance information for individual TOs unless your task is extremely unique or sensitive and you have reason to believe that the past performance information provided under the basic contract would not apply.

3. Technical/Management may also be a criteria, in which case the offeror must be required to provide a white paper with pertinent information.

4. Progress towards subcontracting goals. Contact the OPTARSS contracting officer for information on the applicable goals and status should you elect to make this a criteria.

**B9: TASK ORDER REQUEST FOR PROPOSAL (TORFP).** The Contracting Officer will request a technical/cost proposal from each contractor. A formal RFP is not required or recommended. The contracting officer may also request past performance survey information if the instant TO has unique characteristics. The TORFP will be issued by emailing to all prime contractors the PWS and evaluation criteria for the government’s requirement. Typically, the contractors shall have at least 10 working days to respond to the TORFP. The technical proposal may be written or oral as stipulated in the request. The TO Contracting Officer is encouraged to use electronic submissions, but may authorize submission of TO proposals in any form considered both expedient and safe from unauthorized access.

**B10. TASK ORDER PROPOSALS (TOPs)/CONTRACTORS' SUBMISSIONS:** The contractors' submissions should also be streamlined. Normally, white papers should not exceed 5 pages, although extremely high dollar value or complex requirements may require more. If resumes are required, they normally do not count in the number of pages. Be extremely selective regarding the resumes you request limiting the request to those individuals or positions for which they are essential. The more resumes you request, the more time the contractors need to prepare their proposals. Similarly, letters of commitment, while of interest, are not valid in all states, and require additional time for proposal preparation. Use discretion regarding the positions (if any) for which you require letters of commitment. If you want a staffing plan, so state, and also clarify whether or not it is part of the page limitation. It is recommended that proposals be submitted via email or other electronic media.

**B11. GOVERNMENT PROVIDED PROPOSAL INFORMATION:** SRCC-E has told the OPTARSS contractors that we will advise them of the incumbent, if there is one, when requesting the proposal. In addition, for staffing positions or when there is no workload or other data to allow a contractor to adequately estimate required staffing, the Government may identify the number of positions it envisions it needs. However, both parties realize that this is neither mandatory, nor does it relieve the contractor from responsibility to successfully perform the task. It is also an acceptable practice to provide the contractors with an estimated amount for travel or similar cost reimbursable other costs for evaluation purposes.

**B12. PURCHASES OF INFORMATION TECHNOLOGY (IT) AND MATERIALS:** OPTARSS is a service contract, and as such purchases of materials should be minimal. The contract specifically discusses IT and limits the purchase of IT under the TOs. The dollar value of hardware/software as it pertains to Task Orders issued against this contract is limited to not more than 10% of the estimated cost of the Task Order.

Regarding materials, the contract states that only the Prime Contractor shall acquire materials for Task Orders under this contract. However, on a case-by-case basis, the Prime Contractor may request that a first tier subcontractor be authorized to procure materials provided there is no additional cost for mark-ups (i.e., the total mark-ups whether proposed by the Prime and/or subcontractor shall not exceed the negotiated mark-ups set forth in the contract for that of the Prime Contractor). The Contracting Officer will only approve such a request if it is determined to be in the Government's best interest to allow a first-tier subcontractor to procure materials (i.e., in the interest of obtaining time or cost efficiencies). Materials shall only be **incidental** to the performance of services. (H27.3)

**B13. CONTRACTORS' LABOR RATES:** See the contract clauses H 24 and H 27 for details. To summarize, the contractors' labor rates have been incorporated into the contracts in Technical Exhibit 3. When the password protected web page has been finalized, the rates will be posted there. Until then, contact the contracting officer at [halld@forscom.army.mil](mailto:halld@forscom.army.mil) or [dixie.lee.hall@us.army.mil](mailto:dixie.lee.hall@us.army.mil) for the rates. These rates have been audited and reviewed by the contracting officer and determined to be fair and reasonable for the Atlanta area. These rates are meant to be guidelines for exempt labor categories and act as the maximum the contractor may propose unless authorized due to unique situations. In many cases, contractors offer substantial



discounts off these rates in TO proposals. TOs performed outside of the Atlanta area should be adjusted based on the cost of living in those areas using tools such as Home Fair ([www.homefair.com](http://www.homefair.com)) or Data Masters ([www.datamasters.com](http://www.datamasters.com)) to calculate equivalent rates in the area of performance on any particular TO. If the cost of living in the performance area of a particular TO is higher than in Atlanta, then the contractors' proposals may include rates higher than those shown in the contract.

For non-exempt labor categories, the proposal shall be based on the pertinent wage determination. The load factors proposed in the basic contract should be used for FFP and T&M/LH TOs, the only adjustment allowed being for changes in state tax. CPFF orders may be based on revised DCAA or DCAS approved indirect rates. Be aware that the OPTARSS contracting officer has advised the OPTARSS contractors that clause FAR 52.222-43 does not apply to CPFF TOs.

**B14. SUBCONTRACTORS.** Current approved OPTARSS subcontractors are available at <http://www.forscom.army.mil/aacc/OPTARSS/webOPTARSSteams.doc>. The OPTARSS contracts include the clause FAR 52.244-2 and its alternate I. The contract requires the OPTARSS contracting officer's approval of any subcontractors not in an approved plan that will be used for more than a single TO or for a CPFF TO unless the subcontractor has DCAA approved rates. Contact the OPTARSS contractor should you have any questions regarding a proposed subcontractor.

**B15. EVALUATION OF TASK ORDER PROPOSALS.** As with any other proposal evaluation, the most important thing to remember is to comply with the evaluation plan identified in the TORFP.

**B16. TASK ORDER SOURCE SELECTION:** Award may be made on initial offers, or negotiations may be conducted with one or more offerors. The rationale for negotiating, for the selection of contractors with whom to negotiate and the results should be documented in the file. The TO Contracting Officer shall select the contractor that best meets the evaluation criteria established in the request for TO proposal. The Contracting Officer, as Source Selection Official will prepare an adequate Business Decision Document which will indicate the reason(s) why each competing contractor was or was not selected for the particular task order award based upon the evaluation criteria provided in the initial request.

**B17. PRICE REASONABLENESS.** Typically, OPTARSS TORFPs will result in receipt of at least three offers. However, when less than three offers are received, the OPTARSS contractors' labor rate tables may be used in support of and to document price reasonableness.

**B18. AWARDING TASK ORDERS IN PD2.** All task orders shall be issued as an external award in PD2. Each external award should result in a DD Form 1155 order. However, should this become unworkable, the OPTARSS contractors have agreed to allow "C" type orders, as long as the OPTARSS contract number is prominently cited at the beginning of the contract.

**B19. NOTICES OF AWARD:** You are encouraged to provide notices of award to unsuccessful offerors within a week. Email the preferred mechanism for the notice.

**B20. DEBRIEFS.** Formal debriefings per FAR part 15 are neither required nor suggested. However, to improve the process and relations with the OPTARSS contractors, TO Contracting Officers are encouraged to provide email bullet debriefings to all offerors who proposed under the TO, to include:

*(a) The Government's evaluation of the significant weaknesses or deficiencies in the offeror's proposal, if applicable;*

*(b) The overall evaluated cost or price (including unit prices), and technical rating, if applicable, of the successful offeror and the debriefed offeror, and past performance information on the debriefed offeror;*

*(c) A summary of the rationale for award;*

*(d) Reasonable responses to relevant questions about whether source selection procedures contained in the solicitation, applicable regulations, and other applicable authorities were followed.*

## **C. CONTRACT ADMINISTRATION**

**C1. CONTRACT ADMINISTRATION:** All OPTARSS users are responsible to administer their own task order awards. SRCC-E shall administer only those task orders issued by SRCC-E.

**C2. OPTIONS:** The OPTARSS contracts include the clauses FAR 52.217-9 Option to Extend the Term of the Contract and FAR 52.217-8, Option to Extend Services. TOs may contain options. Exercise of options requires the TO Contracting Officer to notify the contractor of the intent 60 days prior to the expiration of the current period. Also if necessary, it is possible to extend TOs for six months past the normal completion date with 30 days notice. TO Contracting Officers and their customers are responsible to establish adequate suspense systems to ensure timely notification.

**C3. TASK ORDER INVOICING INSTRUCTIONS:** Each TO should provide specific invoicing instructions appropriate for the type of order, the role of the TO Monitor and the applicable paying office. It is suggested that this information be included at the beginning of the TO. The OPTARSS contracts do include the clause at FAR 52.232-36, Payment by Third Party, so payment by government credit card is authorized.

**C4. TASK ORDER MONITOR:** TO monitors or Contracting Officer Representatives should be appointed via formal letter.